Montana Department of
LABOR & INDUSTRY

Montana SIDES Broker Handbook

Instructions & Specifications

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Contributions Bureau

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Table of Contents

Introduction

In April 2017 the Montana Unemployment Insurance Division (UID) will begin participating in the State Information Data Exchange System (SIDES). Initially SIDES will be utilized for the exchange of Benefit Claim Separation notices, however, we anticipate expanding use of SIDES in the future.

Utilizing SIDES Broker IDs, we are implementing a process to allow Brokers to electronically update their client lists using *UI eServices for Employers* (*eServices*).

This document discusses the process and implementation information needed to participate in SIDES using the SIDES Broker Client List Submission Request through *eServices*.

Participation

To participate, Brokers will need to be a registered SIDES Broker and set up to participate with Montana UID (testing will be required).

In addition, Montana requires Brokers to enter into a Memorandum of Understanding (MOU) with the Montana Department of Labor and Industry, Unemployment Insurance Division (UID) attesting you have on file a signed authorization form for each client you represent authorizing you to receive and respond to confidential unemployment insurance (UI) benefit claim information requests. We will not require you to provide us a copy of the authorization form for each client; however, if at any time we do request a copy of the authorization, you must provide it.

To obtain a copy of the required MOU please email uiservices@mt.gov or call (406) 444-6963 or (406) 444-1874. When returning the MOU, please be sure to include the following:

- Legal Name of your Organization
- FEIN
- Mailing Address
- Contact Information (Name, email, phone number of someone who could be contacted if needed)

The signed MOU may be submitted via fax at (406) 444-0629 or email them to cbenjamin@mt.gov

Process Overview

To submit your SIDES Broker Client List, you will need to create an *eServices* web account. The web account will be utilized to upload your client list and to export the results.

The Broker Client List can be uploaded at any time in *eServices*, eliminating time restraints and allowing a return file sent to you through a secure web message to your *eServices* web account.

Creating an *eServices* Web Account

If you do not have an *eServices* web account, please use the instructions below to create one.

1. Go to the *UI eServices for Employers* website: https://uieservices.mt.gov
2. Click the "Click Here to Log in Using ePass" link
   a. If you already have an *ePass Montana* account, log in using your login information and proceed with creating an *eServices* account
   b. If you do not have an ePass Montana account, create one by clicking on the "Login with ePass Montana Login" button and clicking the "Create an Account" button. After the ePass Montana account is created, you can proceed with creating an *eServices* account.
3. Click the "New to UI eServices? Click Here to Signup for Online Access" link
4. Select Third Party Agent
5. Enter the Login Information
6. Enter Third Party Agent Enrollment Type
7. Click Submit
8. On the confirmation page, click OK to access your new *eServices* account.

File Submission and Retrieval Instructions in *UI eServices for Employers*

Submitting a SIDES Broker Client List Submission Request:

1. Log into your *eServices* web account.
2. Click on the Bulk Services tab.
3. Click on the SIDES Broker Client List link.
4. Key or import the client data.
5. Click Submit.

The next day, an email will notify you that a web message exists within your *eServices* web account. This is your indication that SIDES Broker Client List Submission was completed and a return file with any errors will be attached.

Retrieving the return SIDES Broker Client List file:

1. Log into your *eServices* web account.
2. Click the Messages tab and your Unread messages.
3. View Broker Client List web message.
4. Click the blue Broker Client List link to download the file.

NOTE: Once a successful Broker to Client link occurs, we will NOT print and mail Benefit Separation Notices to the employer, they will be sent through SIDES to the broker. It is the responsibility of the Broker to ensure a timely response is completed for their client.

Important Web Pages:

- *UI eServices for Employers*: https://uieservices.mt.gov
- Help Information: http://uid.dli.mt.gov/employers/eservices/help
- FAQ Information: http://uid.dli.mt.gov/employers/eservices/faq
- Contact Information: http://uid.dli.mt.gov/employers/eservices/contact

SIDES Broker Client List Submission Import Record Layout

The SIDES Broker Client List submission can be imported into *eServices* using one of two file formats: Microsoft Excel or delimited text file.

The Broker should generate one record occurrence for each client.

Microsoft Excel Import Record Layout

Your Excel file should follow the format below:

First line – Can contain header information or be left blank
Repeating Rows - Repeated for each client whom the TPA is subject to Montana UI Tax.

- First Column – "A" (Add Client) or "R" (Remove Client)
- Second Column – 7 digit UI account number
- Third Column – 9 digit FEIN
- Fourth Column – Business Name (Optional field)

The tab containing the information MUST be named Sheet1 and saved with an .xls or.xlsx file extension.

Example File Layout:

A	2057574	981651321	COMMON COUNTY
A	2056633	651398765	SMITHS DENTAL PRACTICE
A	2057795	815321321	JOES COFFEE SHOP
R	2057796	816351321	BONNIES DOG RESCUE

Delimited Text File Import Record Layout

Location	Field	Length	Type	Descriptions and Remarks
1	Action Code	1	A/N	Enter “A” to add the client. Enter “R” to remove the client. Required field
2-8	Client UI Account Number	7	A/N	Enter the 7 digit UI account number for each client. Enter only numeric characters. Omit hyphens, prefixes, suffixes or any spaces within the number. Required field.
9-17	Client Federal Employer Identification Number	9	A/N	Federal Employer ID number. Enter only numeric characters. Omit hyphen, prefixes, suffixes or any spaces within the number. Required field
18-59	Client Business Name	41	A/N	Enter client’s business name. Option field, if not used, fill with blanks.

SIDES Broker Client List Submission Export Record Layout

For each record occurrence received from a Broker, we will generate one record occurrence for return.

Location	Field	Length	Type	Descriptions and Remarks
1	Action Code	1	A/N	Enter “A” to add the client. Enter “R” to remove the client. Required field
2-8	Client UI Account Number	7	A/N	Enter the 7 digit UI account number for each client. Enter only numeric characters. Omit hyphens, prefixes, suffixes or any spaces within the number. Required field.
9-17	Client Federal Employer Identification Number	9	A/N	Federal Employer ID number. Enter only numeric characters. Omit hyphen, prefixes, suffixes or any spaces within the number. Required field
18-59	Client Business Name	41	A/N	Enter client’s business name. Option field, if not used, fill with blanks.
60-196	Message	136	A/N	A message is returned for each client occurrence sent in the original file Success – The client was added successfully Warning – The client was successful but something with the record is incorrect Error – The client was not added

Appendix A: File Message Descriptions

The following message descriptions are to notify the Broker of the success or failure of the SIDES Broker Client List Submission Request.

Success: The client information was accurate and a successful link between the Broker and Client has been established. Nothing else needs to be completed. If the Client terminates the relationship with the Broker, please submit a SIDES Broker Client List Submission Request removing the client.

Warning – Client Already Linked: Message is received when information is submitted to Add a client and the client is already linked to the Broker. Remove the client from the file unless the client terminates the relationship with the Broker. If the Client terminates the relationship with the Broker, please submit a SIDES Broker Client List Submission Request removing the client.

Warning – Client Not Linked: Message is received when information is submitted to Remove a client and the client is not linked to the Broker.

Error – Multiple Recs Match to Emplr: Message is received when duplicate information is submitted for a client within the same file. If the UI account number, FEIN, and Business Name match the records on our tax system, the first entry on the file for this client will be accepted and each following record containing the same information will receive this error message.

Error – No Match: Message is received when the UI account number and FEIN submitted from the Broker does NOT match the information in our tax system. Please update the records and submit the client again. If the client information isn't valid in respect to Unemployment Insurance, remove the client from the file.

Error – Client Linked to Other Broker: Message received if more than one Broker has claimed they are responding to Unemployment Benefit information in Montana for a particular client. Because we are unsure which Broker has the authority to file for this client, the new Broker will not be linked to this client. The client must notify any Broker if they are no longer participating in their services. The Broker who is no longer responsible for submitting Unemployment Benefit information for the client needs to submit a new file removing the client.

Error – FEIN Discrepancy Please Verify: Message received if the UI account number submitted matches our tax system, but the FEIN does NOT match our records. Verify the FEIN with the client and either update the file or contact our office to update the FEIN.

Error – Found FEIN Verify State UI Num: Message received if the FEIN submitted match the records on our tax system, but the UI account number does NOT match our records. Update the UI account number on the file.